

# Health Information Alliance, Inc.

## REQUEST FOR QUOTE (RFQ) CONSUMER OUTREACH PARTNER

**POST DATE**  
**May 12, 2022**

**PROPOSALS DUE BY**  
**June 1, 2022 by 5:00 pm**

**AND MUST BE SUBMITTED TO:**  
**Consumer-Facing Communications Strategy Project**  
**submissions@conniect.org**

**ANTICIPATED SELECTION DATE**  
**June 15, 2022**

**QUESTIONS: May be submitted by May 19, 2022 @ 5:00 pm in writing via e-mail to**  
**submissions@conniect.org**



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## I. General Information for Respondents

This Request for Quote (RFQ) is issued by Health Information Alliance (HIA), Inc. dba Connie, the state designated HIE for Connecticut. Connie reserves the right to reject all proposals, to waive or not waive informalities or irregularities in proposals or procurement procedures, and to accept any proposals determined through the review process to represent the best interest of Connie.

This RFQ provides respondents with essential information to enable them to prepare and submit proposals for consideration by the due date.

All proposals shall contain a complete response to this RFQ.

The quoted price shall be inclusive. If the price excludes certain fees or charges, please provide a detailed list of excluded fees with a complete explanation of the nature of those fees.

Respondents must clearly state in the quote if the company proposes to hire sub-contractors. Sub-contractors must be identified and the work they will perform must be specified. In your proposal, please provide the name, address, and Employer Identification Number (EIN) of each sub-contractor.

HIA will not refuse a quote based upon the use of sub-contractors; however, Connie retains the right to refuse the sub-contractors you have selected.

## II. Background

Pursuant to Conn. General Statutes (CGS) Sec. 17b-59d and 17b-59g, the State of Connecticut Office of Health Strategy (OHS) established Health Information Alliance, Inc. (HIA, Inc.) dba Connie, the state-designated HIE for Connecticut. Connie is an independent, not-for-profit, non-governmental entity chartered to build and deliver health information exchange services to the CT health ecosystem. The organizing principle, as affirmed by the CT Health Information Technology Advisory Council, is for Connie to be a “neutral and trusted” health data exchange organization. “Neutral” means no participating organization has an advantage over any other participating organization in Connie’s services. “Trusted” means that oversight of Connie’s business operations is conducted by representatives of the universe of participating organizations.

HIA, Inc. dba Connie, was incorporated in July 2019. The board of directors has met regularly since October 2019.

Connie is designed to oversee and drive services to support the exchange of health data in the State. It is Connie’s vision to be the statewide leader, advocate, and catalyst for the adoption and use of health information technology and health information exchange services that bring tangible, meaningful, and sustainable value to stakeholders across Connecticut.

### III. Objectives and Required Activities

The objective of this RFQ is to enable Connie to create a thoughtful, robust, multi-channelled and effective patient-centered consumer outreach plan. Through this process, we want to understand the consumer's perspective on how Connie can best support patients and develop a roadmap to effectively communicate with and engage patients to meet their health data needs.

The following are the project objectives and required activities:

1. **Understand the Connie consumer and potential impact of Connie (40% Project Load)** – Conduct market research to produce a comprehensive Landscape Review that will yield a foundation of evidence on which to base strategic outreach and communication decisions. Administer and facilitate direct outreach with consumers and other stakeholders to gain understanding. Direct outreach should include varied methods and strategies such as key stakeholder interviews, focus groups, and surveys to capture a collective and trended analysis of how consumers feel about the following points of interest\*:
  - Understand how involved patients want to be in advocating for their own healthcare and in what ways
  - Measure current knowledge level around healthcare interoperability and determine how to best educate patients on how Connie has made interoperability possible
  - Determine how patients want to use the Health Information Exchange, what kind of access patients want to have, and what data they most want to access
  - Identify what Connie services garner the most interest and how best to communicate these services to the consumer
  - Understand the concerns and questions patients have about Connie and health data exchange
  - Gauge patient interest in participating in user-centered design sessions
  - Understand any health data challenges that patients face

*\*Subject to change, points of interest will be finalized with selected respondent during contracting and project planning process*

2. **Develop consumer-facing strategy (40% Project Load)** – Develop a comprehensive consumer-facing strategy and roadmap that outlines consumer needs/interests, addresses known concerns, and highlights opportunities as determined by market research and the comprehensive Landscape Review. Provide the best methodologies for reaching consumers, a plan to engage patients, talking points to overcome concerns/objections, tasks to execute communication concepts and marketing objectives, timelines for a phased rollout approach, milestones to meet prior to advancing to the next phase, and strategy evaluations for each campaign.
3. **Determine methodology for measuring success (10% Project Load)** – Define what a successful consumer-facing, patient-centered consumer outreach plan would look like, as determined by adherence to timelines, the development of measurable milestones,

creation of specific campaign evaluations, tracking and presentation of results and management of remaining objectives.

4. **Help to inform the design of the Patient/Family Advisory Committee (PFAC) (10% Project Load)** – Gather input from Connie’s stakeholders including consumer and provider groups, as well as patient advocacy organizations, on what the scope and design of a PFAC should be, as well as make recommendations on how to accomplish this work and how to effectively recruit membership. Learn key information such as:
- How should Connie approach building the committee?
  - What positions/industries should comprise the group?
  - How does Connie ensure effective two-way communication and build trust?
  - What is the best way to foster ongoing feedback?

#### IV. Project Scope and Deliverables

Proposed Activity	Tasks	Deliverables and Estimated Finish Dates
Understand the Connie consumer and potential impact of Connie	Finalize proposed project plan for Connie approval; Prepare and present outreach activity materials, facilitate all outreach activities, capture feedback, and prepare summaries of outreach activities; Draft report including summary of methodology and outreach process/participants, findings, considerations and recommendations.	Approved Project Plan (6/30/22)  Outreach Activities Artifacts and Summaries (8/15/22)  Final Landscape Review Report (8/30/22)
Develop Consumer-Facing Strategy	Prepare and present formal recommendations to Connie leadership and others such as the Connie Board of Directors, Connie Clinical Advisory Council, Connie Operations Advisory Committee, HITAC, and/or others as requested; Incorporate feedback and modifications as requested by Connie leadership	Consumer Outreach Strategy & Plan (8/30/22), to include: <ul style="list-style-type: none"> <li>• Deliverables listed in Section III.2. Objectives and Required Deliverables</li> <li>• Communication and outreach recommendations</li> <li>• Key Patient Messaging</li> <li>• Campaign Themes</li> <li>• Operational Implications</li> <li>• Rollout Timelines</li> </ul>
Determine methodology for measuring success	Develop, prepare, and present a strategy to determine what success looks like, how it will be measured, what tools to use, and when to evaluate.	Consumer Outreach Strategy & Plan Success Measures (9/30/22), to include: <ul style="list-style-type: none"> <li>• Deliverables listed in Section III.3. Objectives and Required Deliverables</li> </ul>

		<ul style="list-style-type: none"> <li>• Key Milestones</li> <li>• Campaign Evaluations</li> <li>• Tracking Mechanisms</li> </ul>
Help to inform the design of the PFAC	Prepare and present recommendations for committee development.	Patient/Family Advisory Committee (PFAC) Recommendations (9/30/22), to include: <ul style="list-style-type: none"> <li>• Deliverables listed in Section III.4. Objectives and Required Deliverables</li> <li>• Input summary</li> <li>• Overall Recommendations</li> </ul>

## V. Proposed Budget

Please provide a detailed budget as part of the response to accomplish the project scope and deliverables as outlined in the RFQ. The proposed budget must include all costs associated delivery of services, including any travel and incidental expenses. All respondents are required to comply with requirements related to sub-contractors as stipulated in the General Information for Respondents section. This is a not-to-exceed project budget.

## VI. Response Submission Process

Responses must be submitted via email to: [submissions@conniect.org](mailto:submissions@conniect.org). Only complete responses submitted by the response deadline will be reviewed.

## VII. Term of Contract

The term of the contract will commence upon contract execution, anticipated by July 1, 2022, and continue as defined in the associated work order or until terminated in accordance with contract termination provisions.

## VIII. Review Process Timeline (Subject to Change)

The following timeline will be followed:

Event	Date
RFQ Published	May 12, 2022
RFQ Questions Submission Deadline	May 19, 2022 @ 5:00 pm
Question Responses Published	May 24, 2022 @ 5:00 pm
RFQ Responses Due	June 1, 2022 @ 5:00 pm
Vendor Presentation	Optional - TBD as Requested by Connie
Respondent Selection	June 15, 2022
Project Kick-off	Upon Executed Agreement

## IX. Response Requirements

**NOTE:** Submissions should not exceed 15 pages.

### **RFQ Response or Proposal Format:**

- 1. Response Cover Letter/Introduction** (1-page max)
- 2. Respondent's Understanding of the RFQ's Ask** (2-page max)

Please provide a narrative detail that describes your understanding of what HIA, Inc. dba Connie is asking for in this RFQ and the key considerations involved.

- 3. Delivery Approach, Proposed Project Plan, and Implementation Timeline** (8-page max)

- Please describe your approach, how you would deliver, and what is included in each of the following: Proposed plan for project activities, timeline, and deliverables.
- Include the organizational makeup, if prime and subcontractors, to be used and for what areas of the project.

- 4. Organizational Qualifications** (2-page max)

- Please provide a narrative overview of:
  - a. Breadth and depth of your organization
  - b. Overview of Project Team: Names, titles, project role/responsibility, and credentials for team assigned to the project
  - c. If you have multiple staff to fill key positions to demonstrate the depth of your organization, please include and identify any secondary staff as backup staff resources.
  - d. Identify if you will be teaming or use sub-contractors for any part of the delivery. Describe the sub-contractor organization, the roles and the qualifications for the roles.
- Project Team Resumes/Bios: For each project team member identified, please provide the resumes and/or bios that describe each member's qualifications. Include in Appendix A. (Does not count toward 15-page limit.)
- References: List of organizations and contacts for whom you preformed similar work. Include in Appendix B. (Does not count toward 15-page limit.)

- 5. Cost & Assumptions** (2-page max)

Please include a detailed budget and narrative description to aid in understanding each cost amount. Include in the narrative any details regarding costs, such as underlying assumptions and pricing details, which will help us in understanding the proposed costs.

- 6. Appendices** (Does not count toward 15-page limit.)

Attach the following appendices:

- a. Appendix A: Project Team Resumes/Bios
- b. Appendix B: References

- c. Appendix C: Terms & Conditions - Identify any requested edits to the Terms & Conditions by providing a redline version showing requested edits. Please identify which ones are non-negotiable.
- d. Appendix D: Mandatory Forms
  - Respondent's EEO Report (Equal Opportunity Employment)
  - Vendor Set-up Forms (RFQ Exhibit A1-A2) Note: Optional for RFQ response submission, but required if selected.
  - Required Forms (RFQ Exhibits B1-B5)

## X. Presentation/Interview

As needed, presentations/interviews may be held at Connie's request prior to respondent selection. The presentation must be given by the members of your team that will be assigned to this project. Any respondents selected for a presentation/interview will be contacted directly and provided with the specific details necessary.

## XI. Method of Selection

A selection committee will review the proposals submitted in response to this RFQ. The award of the contract for services will be made, if at all, to the respondent whose evaluation by the selection committee and subsequent approval by Connie executive leadership and, if applicable, Connie's Board of Directors is determined to be in the best interests of HIA, Inc. dba Connie. Those organizations that demonstrate experience with similar projects, outline a clear and comprehensive response as defined in the RFQ are more likely to be successful. However, the selection of a respondent and the execution of a services agreement, while anticipated, are not guaranteed. Connie reserves the right to reject any or all of the proposals, or parts thereof, and/or to waive any informality or informalities in any of the proposals or the procurement process for this RFQ, if such rejection or waiver is deemed in the best interests of Connie. Neither, Connie, nor any of its directors, employees or authorized agents shall be liable for any claims or damages resulting from the evaluation, selection, non-selection or rejection of any proposal submitted in response to this RFQ.

## XII. Equal Employment Opportunity

Each contractor who enters into an agreement with HIA, Inc. dba Connie shall not discriminate in employment or in the provision of equal housing opportunities to any person in any manner prohibited by the applicable provisions of federal and state law and regulation as presently in full force and effect, as may be amended, from time to time, and such prohibition shall be included in such agreement.

In the event of non-compliance by contractor with said federal and state laws and regulations, subject to the provisions thereof, the agreement may be cancelled, terminated or suspended in whole or in part, and such contractor may be declared ineligible for further procurements and agreements with HIA, Inc. dba Connie.

### XIII. General Terms and Conditions

A prospective respondent must be willing to adhere to and accept the terms and conditions of this RFQ, including the following, and must positively state its acceptance and compliance with such terms and conditions in its response to this RFQ.

1. Acceptance or Rejection by Connie – Connie reserves the right to accept and/or reject any or all proposals submitted for consideration. Respondents whose proposals are not accepted will be notified in writing.
2. Ownership of Documents – All proposals submitted in response to this RFQ are the sole property of Connie and subject to the provisions of Section 1-200 et. seq. of the Connecticut General Statutes (re: Freedom of Information).
3. Timing and Sequence – Timing and sequence of events resulting from this RFQ will ultimately be determined by Connie in its sole and absolute discretion.
4. Oral Agreements – Any alleged oral agreement or arrangement made by any respondent with any employee, agent or any member of the Connie Board of Directors, will be void and of no force and effect.
5. Amending or Canceling Requests – Connie reserves the right to amend or cancel this RFQ prior to the proposal due date and time, if it is in the best interest of Connie to do so.
6. Rejection of Non-Responsible Respondents – Connie reserves the right to reject the proposal of any respondent who is in default of any prior contract or for misrepresentation.
7. Connie reserves the right to correct inaccurate awards resulting from its clerical errors.
8. Rejection of Proposals – Proposals are subject to rejection in whole or in part if they limit or modify any of the terms and conditions and/or specifications of this RFQ.
9. Changes to Proposals - No additions or changes to the original proposals will be allowed after submittal.
10. Contract Requirements – A formal agreement will be executed with the company selected.
11. Rights Reserved to Connie – Connie reserves the right to award or reject any and all proposals in whole or in part, to waive technical defects, irregularities and omissions in any of the proposals or the RFQ process if, in Connie's judgment, the best interests of Connie are served.
12. Withdrawal of Proposals – Negligence on the part of the respondent in preparing its proposal confers no right of withdrawal after the time fixed for the submission of proposals. A proposal may be withdrawn by an appropriate document duly executed (in the manner that a proposal must be executed) and delivered to the place where proposals are to be submitted prior to the proposal due date.
13. Assigning, Transferring of Agreement – The successful respondent is prohibited from assigning, transferring, conveying, subletting or otherwise disposing of the awarded agreement or its rights, title or interest therein or its power to execute such agreement to any other person, company, or corporation without the prior written consent and approval of Connie
14. Cost of Preparing Qualification Statements – Connie shall not be responsible for any expenses incurred by any firm or organization in preparing and submitting a proposal.

All proposals shall provide a straightforward, concise delineation of the firm's capabilities to satisfy the requirements of this RFQ. Emphasis should be on completeness and clarity of content.

15. Release & Waiver – Each respondent releases and waives any and all claims or actions that it may have against Connie, its employees, directors or authorized agents as a result of, or in connection with, the exercise of any rights of Connie under this RFQ.
16. Indemnification and Insurance – Each respondent acknowledges and agrees that the following provisions will be included in the formal agreement referred to in section 10 above.
  - A. Indemnification
    - i. Consultant shall, at all times, defend, indemnify, protect and save harmless Connie and their respective officers, agents and employees (collectively, the "Indemnitees") from and against any and all liabilities, actions, claims, damages, losses, judgments, workers' compensation payments, costs and expenses (including but not limited to attorneys' fees) arising out of injuries to the person, including death, property damage or other damages sustained by any of the Indemnitees, consultant or any other person, party, or entity, to the extent any such injuries, damage or damages are caused or alleged to have been caused in whole or in part by the acts, omissions, errors or negligence of consultant or any of its officers, agents, representatives, employees or subcontractors. The expenses covered by the foregoing indemnification shall include those to investigate, defend and settle any claim, judgment or payment of any legal liability. Upon demand of HIA, Inc., consultant shall immediately pay to Connie the amount of any expenses incurred by any of the Indemnitees that is covered by the foregoing indemnification. The obligations of consultant under this indemnification shall survive the termination or expiration of the agreement. The existence of insurance shall in no way limit the scope of this indemnification.
  - B. Insurance
    - i. Consultant shall procure and maintain, at its own cost and expense, throughout the term of the agreement and any extension thereof, the insurance required by the agreement, including any required endorsements thereto and amendments thereof. Consultant shall be solely responsible for any deductibles or retentions required in connection with the above-referenced insurance, and consultant shall indemnify and hold harmless Connie for any cost or liability associated with such deductibles or retentions, including but not limited to any payment thereof.
    - ii. Prior to commencing any services, consultant shall submit to Connie a certificate or certificates in an accord form or a form of the same format for each insurance referenced in Subsection (i) above certifying that such insurance is in full force and effect and setting forth the information required by Subsection (iii) below. Additionally, respondent shall furnish to Connie within thirty (30) days before the expiration date of the coverage of each insurance referenced in Subsection (i) above, a certificate or certificates containing the information required by

- Subsection (iii) below and certifying that such insurance has been renewed and remains in full force and effect.
- iii. All policies for each insurance referenced in subsection (i) above shall: (i) include Connie as additional insureds (this requirement shall not apply to workers' compensation insurance, employers' liability insurance or professional liability insurance); (ii) include a standard severability of interest clause; (iii) provide for not less than thirty (30) days prior written notice to Connie by registered or certified mail of any cancellation, restrictive amendment, non-renewal or change in coverage; (iv) contain a waiver of subrogation holding Connie free and harmless from all subrogation rights of the insurer; and (v) provide that such insurance hereunder is the primary insurance and that any other insurance that Connie may have shall be deemed in excess of such primary insurance.
  - iv. All policies for each insurance required hereunder shall be issued by insurance companies that are licensed to conduct business in the State of Connecticut and have a current A.M. Best's minimum financial size rating of X and key rating of A-.
  - v. All of the insurance requirements set forth in this paragraph B. shall apply to any subcontractors hired by Consultant to perform any of its obligations hereunder. Connie reserves the right to require any additional insurance coverage for any specific work to be performed by any of consultant or consultant's subcontractors.
  - vi. No provision of this paragraph B. shall be construed or deemed to limit consultant's obligations under the agreement to pay damages or other costs or expenses.
17. Affirmative Action – Demonstration of commitment to affirmative action by full compliance with applicable affirmative action policies and regulations including but not limited to HIA Inc.'s board policies and Connecticut General Statutes §§ 4a-60 and 4a-60a.
18. Acceptance – All proposals submitted in response to this RFQ shall remain open and subject to acceptance by the Connie for a period of six (6) months after the proposal due date.

#### XIV. Exhibit A

See HIA Inc - Vendor Set-up Forms – Exhibits A1 – A2 (Two separate files)

#### XV. Exhibit B

See HIA Inc – Required Forms – Exhibits B1 – B5 (One separate file)